
Planned Giving: Gifts of a Lifetime

Course Outline

- Planned Giving defined
 - What it is and what it is not
 - Present vs. future interest
 - Common planned gift vehicles
 - Appreciated securities
 - Charitable gift annuities
 - Bequests
 - Charitable trusts (charitable remainder, charitable lead, etc.)
 - Real estate – outright and life estate
 - Beneficiary designations – retirement accounts, life insurance
 - Pooled income funds
 - Tangible personal property
 - Other ways to give
 - Donor Advised Funds
 - Foundations
 - Motivations
 - Advantages/disadvantages of each vehicle
 - Timing
 - Taxes
 - Income tax planning
 - Estate and gift tax planning
- Life Cycle of a Planned Gift
 - Creation
 - Who creates the gift vehicle?
 - Why choose one vehicle over another?
 - Administration during donor's lifetime
 - Probate Process
 - Mechanics of probate and trust administration
 - What should a nonprofit be aware of during the process?
 - Administration after donor's death
 - Generational philanthropy
 - Demographics
- Use of Planned Gifts

- Donor restrictions and donor intent
 - Gift acceptance policies and written gift agreements
 - Endowments
 - UPMIFA – Florida Statute concerning endowments
- Build It and They Will Come
 - Nonprofit readiness for planned giving
 - Internal policies and procedures
 - Board involvement for planned giving
 - Integrating planned giving into an overall development plan
 - Marketing
 - Internal
 - External
 - Do you know your donors?
 - Print, digital
 - Reputation
 - Events
 - Planned Giving Society
 - Planned Giving Advisory committee
 - Donor Stewardship and Recognition
 - Counting policy for planned gifts
 - Substantiating planned gifts
- Ask and You Shall Receive
 - Remember the Fundamentals of Fundraising
 - Identifying Planned Giving prospects
 - What to listen for
 - Building a pipeline of gifts
 - The Planned Gift “Ask”
 - It’s All in the Timing
 - Is your organization ready to commit over the long-term
- Ethics
 - Model Standard of Practice for the charitable gift planner
 - Other ethical guidelines
 - Don’t do anything you wouldn’t want published in the New York Times or Orlando Sentinel
- Organizational readiness
 - Determine the current goal and capabilities of the nonprofit
 - Can it commit time, staff and resources?
 - Reasonable time horizon
- Tips from the field
- Resources